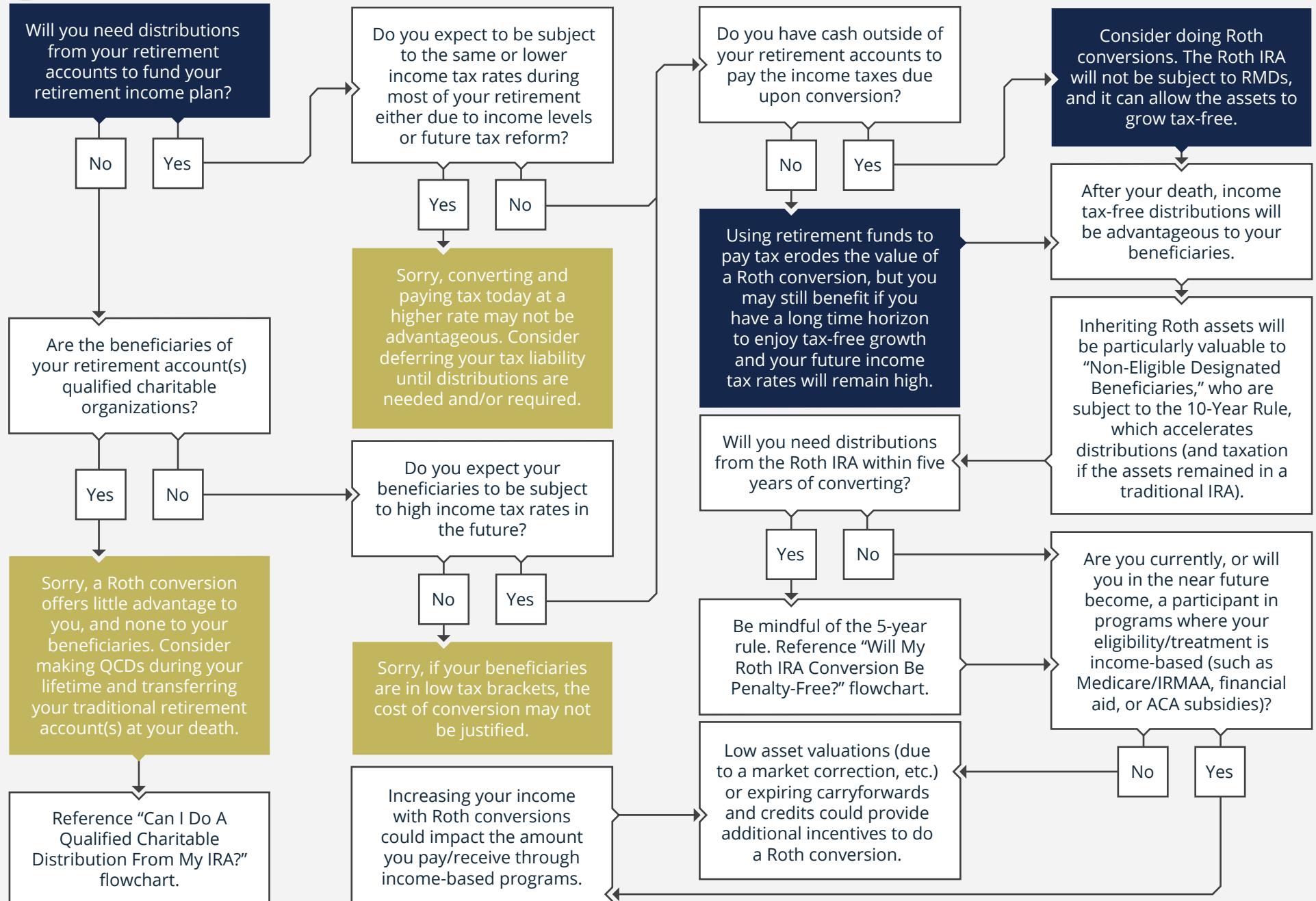


2022 · SHOULD I CONSIDER DOING A ROTH CONVERSION?



Start Here



Want to know how this would apply to your situation?



Contact Planable Wealth to have a conversation with one of our financial professionals



Securities and advisory services offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC

This information is not intended to be a substitute for specific individualized tax advice. We suggest that you discuss your specific tax issues with a qualified tax advisor.

Traditional IRA account owners have considerations to make before performing a Roth IRA conversion. These primarily include income tax consequences on the converted amount in the year of conversion, withdrawal limitations from a Roth IRA, and income limitations for future contributions to a Roth IRA. In addition, if you are required to take a required minimum distribution (RMD) in the year you convert, you must do so before converting to a Roth IRA.

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